



## Beginning Monitoring & Initial Assessment

**Monitoring** refers to reaching out to your contact to assess their symptoms and resource needs, and it may be done digitally or over the phone. Regardless of how you are monitoring your contact, CCTO will be used to document monitoring and store assessments.

**Note:** Your contact may have received a [notification](#) from the system and opted to begin digital monitoring through the portal. If so, you may already see an initial assessment completed. *Skip to step #4 to check if this is the case.*

### #1: Prepare to initiate monitoring by reviewing all information, especially:

- **Date of Birth** may or may not contain data. Contacts use this to verify their identity when accessing digital assessments, so you will not be able to turn on “Enable Digital Monitoring” (i.e., auto-sending contacts daily assessment links) until you can obtain a DOB from your contact. This is okay, and you can still enable digital monitoring later. *See the last page for more info.*
- **Preferred Method of Contact** defaults to “Phone Call,” and you can leave this until you determine your contact’s preference. This must be updated to allow your contact to receive assessments via text or email. *Note: if a contact has responded to a digital notification, they may have already updated this preference.*

### #2: Then, initiate monitoring within CCTO: Set Monitoring Status to “Monitoring” and Enable Digital Monitoring to “Yes.”

- **Monitoring Status** documents that you are actively monitoring this contact.
- **Enable Digital Monitoring** sends automatic daily outreach with assessment links (see [job aid](#)) if **Preferred Method of Contact** is set to “Text Message” or “Email” and DOB is provided. It also creates a blank initial assessment within CCTO regardless of **Preferred Method of Contact**. *You will not be able to turn on **Enable Digital Monitoring** if a contact does not yet have a DOB. This is okay! You should still set **Monitoring Status** to “Monitoring,” and you can update this field later.*

### #3: Save your work: This creates an initial assessment if **Enable Digital Monitoring** is on.

### #4: When you are ready to collect or review contact responses, open an assessment: Visit the “Assessments” page at the top of your contact’s monitoring event.

- See the [CD Manual Scripts Page](#) for language to use in your contact conversation.
- If **Begin Monitoring** was turned on successfully, an assessment marked “Initial” will already be created. Click into this assessment to begin collecting or reviewing contact responses.
- If **Begin Monitoring** is set to “No,” click “+New Assessment” in the top right corner of the screen.

# CCTO Micro-Training: Beginning Monitoring & Assessments

## Understanding Assessment Fields & Completing a Manual Assessment



This page explains key fields that may either be completed manually by the tracer (for manual phone assessments) or digitally by a contact (per the next page). **Before you create a new manual assessment, check if a blank assessment is already available** per #4 on page 1:

- If this is your contact's first assessment and an assessment marked "Initial" already exists, click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click **"New Assessment"** in the **top right corner** of the screen.

The screenshot shows the 'New Assessment' form with the following sections and fields:

- Top Bar:** Includes a back arrow, a red circle with the number 4 around the 'Save & Close' button, a '+ New' button, and a 'Flow' dropdown.
- Assessment Tab:** The active tab, with sub-tabs for 'Suggested Exposures' and 'System Information'.
- Basic Info:**
  - Source Contact: Miss Piggy
  - C#: C-0000035457
- Details:**
  - Assessment Type: Initial (highlighted with a red box and callout 1)
  - Agreement: Yes, I agree to participate. (highlighted with a red box and callout 2)
  - Agreement/Disagreement Date: (empty field)
- Covid-19 Test Results:**
  - Have you received a Covid-19 test result?: Yes
  - Test Date: 11/5/2020
  - Test Location: Main St Walgreens
  - Test Results: Negative
- Symptoms:**

Fever	Yes
Highest temperature in the past 24 hours	100.1
Sweats	No
Chills	No
Headache	No
Muscle Aches	No
Sore Throat	No
Cough	No
Loss of Smell or Taste	No
Shortness of Breath/Difficulty Breathing	No
Stomach Pain or Cramps	No
Vomiting	No
- Additional Questions:**

Access to Phone or Computer?	Yes
Do you have a face covering at home with you?	Yes
Able to remain in your home without guests during quarantine?	Yes
Do you have the ability to isolate yourself within your ...	Yes
Do you have any household members that are high risk for ...	No
Do you have someone that could run errands and get ...	Yes
Do you have a primary care provider?	Yes
Other Resource Needs	May require assistance with getting child ...
If you identified a resource need, is it okay for someone ...	Yes

**#1: Assessment Type:** This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.

- Both types collect the same symptom and test result information.
- **Initial** assessments display a full list of resource need questions. **Monitoring** assessments ask contacts: "Do you have a new resource need?" and only request details if contacts respond "Yes."

**#2: Agreement:** Select "Yes, I agree to participate" if your contact agrees.

- Completing this field and saving will update the **Last Assessment Date** field on contact monitoring events (MEs).

**#3: Remaining Fields:** Collect per your contact's responses [per the script](#).

- Each time **COVID-19 Test Results** is completed, a contact ME section for **Contact Reported Test Results** will appear and update. The contact ME section for **Testing Details** will not update automatically. Defer to your local guidance on how you should use this section.
- The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact ME field for **First Date Symptoms Reported** will update.
- Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact ME field for **Most Recent Date Resource Need Reported** will update.

**#4: Save & Close:** Click to save your work and record the assessment. Review this assessment at any time by returning to the "Assessments" page.



## Setting Up & Reviewing Digital Assessments

**Digital assessments** are sent to contacts as links within automated daily texts or emails, and they can complete these assessments on their own (see [job aid](#)). To ensure that daily digital outreach is properly turned on and to review completed assessments:

The screenshots show the following steps:

- Step 1:** The 'Date of Birth (DOB)' field is set to 1/1/2000.
- Step 2:** The 'Monitoring Details' section shows 'Enable Digital Monitoring' set to 'Yes' and 'Monitoring Status' set to 'Monitoring'.
- Step 3:** The 'Save' button is highlighted in the top navigation bar.
- Step 4:** The 'Assessments' tab is selected in the top navigation bar, showing a table of assessment records.
- Step 5:** The 'Assessments' tab is selected, showing a table of assessment records.

The assessment records table in steps 4 and 5 shows the following data:

Source	Monitoring Event	Date	Created On	Local Health...	Assessment
Old Body	9/16/2021	9/16/2021 5:01 PM	FootHills	Initial	
Old Body	9/16/2021	9/16/2021 5:20 PM	FootHills	Monitoring	
Old Body	9/16/2021	9/16/2021 5:01 PM	FootHills	Initial	

### #1: Confirm or update key information:

- **Date of Birth.** Contacts will use this to verify their identity and access their digital assessments.
- **Email or Primary (mobile) Phone Number** for contacts to receive assessments.
- **Preferred Method of Contact** to “Text Message” or “Email” depending on your contact’s preference. This tells the system how to send assessment links.
- **Monitoring Status** to “Monitoring.”

**#2: Enable Digital Monitoring:** Setting this to “Yes” turns on automatic digital outreach if you have completed the other fields properly.

**#3: Save:** This turns on digital outreach and sends the assessment link.

**#4: Confirm creation:** Click “Assessments” at the top of your contact’s monitoring event to confirm that the assessment has been created.

**#5: Review completed assessments:** You can review any assessment completed by your contact by returning to the Assessments Page in their monitoring event and selecting an assessment from the list.